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# 11th Quad FM Meeting Delhi: USD 20 Billion Critical Minerals + IPMSC

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# 11th Quad FM Meeting Delhi: USD 20 Billion Critical Minerals + IPMSC

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## WHY IN NEWS:

India hosted the **11th Quad Foreign Ministers' Meeting** at Hyderabad House, New Delhi on **May 26, 2026**. External Affairs Minister Dr. S. Jaishankar chaired the meeting, with US Secretary of State Marco Rubio (his first official India visit since taking office on January 20, 2025), Australia's Foreign Minister Penny Wong, and Japan's Foreign Minister Toshimitsu Motegi participating. The Ministers adopted **four formal outcome documents**, anchored by a landmark **Quad Critical Minerals Initiative Framework** that mobilises up to **USD 20 billion** in government and private support, and a first-of-its-kind **Indo-Pacific Maritime Surveillance Collaboration (IPMSC)**.

## SETTING THE STAGE: WHY THIS MEETING MATTERS

The 11th Quad FM Meeting was the first major Quad-level event under the **Trump 2.0 administration**, making it a critical test of the grouping's resilience amid US tariff turbulence (25% reciprocal tariff + 25% Russian oil penalty effective August 27, 2025) and renewed strategic competition with China. By delivering four substantive outcome documents — not merely a joint communique — Delhi reinforced the Quad's transition from a “talk-shop” to an “outcomes-shop,” consistent with the **Wilmington Summit (September 21, 2024)** template.

The meeting also marked the operational deepening of India's **MAHASAGAR doctrine** — the expanded successor to PM Modi's 2015 SAGAR (Security and Growth for All in the Region) vision — into a pan-Indo-Pacific commitment.

## THE FOUR OUTCOME DOCUMENTS

#	DOCUMENT	CORE FOCUS
1	Joint Statement	Comprehensive Indo-Pacific roadmap covering security, technology, infrastructure, health, climate
2	Fact Sheet	Concrete deliverables and timelines
3	Joint Statement on Indo-Pacific Energy Security	Technology, market analysis, emergency response architecture
4	Quad Critical Minerals Initiative Framework	USD 20 billion mobilisation across three pillars

## QUAD CRITICAL MINERALS INITIATIVE FRAMEWORK — DEEP DIVE

The Critical Minerals Framework is the single most consequential Quad deliverable since the 2022 Tokyo summit. It directly responds to **China's 85–90% global share in rare earth processing** and recent export controls on gallium, germanium, graphite, and rare earth magnets.

### Three Pillars

PILLAR	SCOPE
Investments & Project Development	Joint financing for mining, midstream processing, and offtake agreements across Quad geographies
Regulatory Alignment	Common standards on ESG, traceability, customs facilitation, and export licensing
Recycling & Recovery	Urban mining, e-waste recovery, and circular supply chains for end-of-life batteries

### Minerals Covered

The Framework targets minerals critical for semiconductors, electric vehicles, clean energy, and defence: lithium, cobalt, nickel, graphite, rare earth elements (REEs), gallium, germanium, and tungsten.

### India's Domestic Anchor

India enters the Framework with three institutional pillars in place:

- **National Critical Mineral Mission (NCMM)** — ₹16,300 crore outlay, launched January 2025; covers exploration, processing, recycling, and overseas acquisition.

- **KABIL (Khanij Bidesh India Ltd)** — joint venture of NALCO + Hindustan Copper Ltd + Mineral Exploration Corporation Ltd; mandated for overseas exploration and acquisition, including the Argentina lithium block agreement.
- **30-mineral Critical List (2023)** — Ministry of Mines notification identifying minerals essential to India’s energy transition and strategic autonomy.

## INDO-PACIFIC MARITIME SURVEILLANCE COLLABORATION (IPMSC)

The IPMSC is the **first-ever Quad initiative pooling formal maritime surveillance assets** — a substantive upgrade over the existing commercial-satellite-based architecture.

### IPMSC vs IPMDA: The Distinction

FEATURE	IPMDA (SINCE 2022)	IPMSC (2026)
Launched	Tokyo Quad Summit, <b>May 24, 2022</b>	New Delhi, May 26, 2026
Asset Type	Commercial satellite tracking (radio-frequency, AIS)	Formal pooling of naval surveillance platforms
Initial Focus	Indo-Pacific-wide partner navies	Indian Ocean Region (IOR)
Use Case	Dark-shipping detection, IUU fishing, HADR	Joint patrol coordination, persistent maritime domain awareness

### Assets in the IPMSC Pool

- **India** — 12 Boeing P-8I Neptune long-range maritime patrol aircraft
- **United States** — P-8A Poseidon fleet
- **Japan** — Kawasaki P-1 maritime patrol aircraft
- **Australia** — MQ-4C Triton high-altitude long-endurance UAVs

This pooled architecture directly counters Chinese PLA-Navy expansion in the IOR (Djibouti base, Hambantota lease, Gwadar) and complements India’s role as the **net security provider** in the region.

## QUAD INITIATIVE ON INDO-PACIFIC ENERGY SECURITY

The third outcome document — the Joint Statement on Energy Security — sets up a Quad **Fuel Security Forum to be hosted by the United States later in 2026**. The Forum will cover technology cooperation (small modular reactors, hydrogen, LNG), market analysis (price discovery, strategic petroleum reserve coordination), and emergency response mechanisms.

The initiative reflects post-**OFAC Russia oil waiver expiry (May 16, 2026)** energy supply anxieties and lessons from the 2025 Iran war, when Strait of Hormuz disruption risks spiked global oil prices.

## OTHER KEY DELIVERABLES

DELIVERABLE	DETAIL
Ports of the Future Partnership	First commitment with <b>Fiji</b> on port modernisation — strategic counter to BRI port investments in the South Pacific
Indo-Pacific Logistics Network (IPLN)	Second tabletop exercise (TTX-2) to be hosted by <b>Japan in 2026</b>
Pacific Islands Undersea Cables	Quad pledge to connect all Pacific Island Forum countries via secure undersea cables by 2026 — counters Huawei Marine / HMN Tech penetration
Quad Cancer Moonshot	Follow-through on Wilmington (September 21, 2024) commitments on cervical cancer screening and HPV vaccination across the Indo-Pacific

## COUNTER-TERRORISM LANGUAGE: A DIPLOMATIC WIN

The Joint Statement contained an **unequivocal condemnation of cross-border terrorism**, with two specific attacks named:

- **Pahalgam terror attack (April 22, 2025)** — India’s diplomatic win; first time a major multilateral platform named Pahalgam explicitly.
- **Bondi Beach attack (December 14, 2025)** — Australia’s win, reflecting Canberra’s growing concern with Islamist radicalisation.

The Ministers committed to denying terrorist safe havens, disrupting financing, and **bilateral intelligence-sharing** — implicitly framing Pakistan-sponsored terrorism without naming Islamabad.

## INDO-PACIFIC FRAMING

- **“Free, open, inclusive and resilient Indo-Pacific”** — the standard FOIP framing was retained, signalling continuity despite Trump-era flux.
- **“Serious concerns”** over the East China Sea and South China Sea situation — the standard oblique China reference covering Senkaku, Taiwan Strait, and the nine-dash line.
- The Quad condemned **“coercion”** threatening peace and stability — language directly targeting Chinese grey-zone tactics.

- **ASEAN centrality** reaffirmed, with explicit support for the **ASEAN Outlook on Indo-Pacific (AOIP)** adopted June 2019.

## TECHNOLOGY COOPERATION

Building on the Quad Critical and Emerging Technologies Working Group, the Ministers committed to:

- Semiconductor supply chain resilience (post-CHIPS Act, post India Semiconductor Mission)
- AI safety and governance frameworks
- Biotechnology and vaccine R&D
- Quantum technologies
- Undersea cable protection (against state-sponsored sabotage)

## THE QUAD'S INSTITUTIONAL JOURNEY

YEAR	MILESTONE
2004	Tsunami Core Group — informal origin
2007	Quad 1.0 launched at Manila (PM Abe's initiative)
2008	Australia withdrew under PM Kevin Rudd; Quad lapsed
November 2017	Quad 2.0 revived at Manila (ASEAN sidelines)
March 12, 2021	First Quad Leaders' Summit (virtual) — Biden, Modi, Suga, Morrison
September 24, 2021	First in-person Quad Leaders' Summit, Washington DC
May 24, 2022	Tokyo Summit — IPMDA launched
May 2023	G7 Hiroshima sidelines mini-summit
September 21, 2024	Wilmington Summit
May 26, 2026	11th Quad FM Meeting, New Delhi

## INDIA'S INDO-PACIFIC DOCTRINE EVOLUTION

India's Indo-Pacific architecture has matured across three pillars:

- 1 **SAGAR** (Security and Growth for All in the Region) — articulated 2015 in Mauritius by PM Modi.

- ② **MAHASAGAR** (Mutual and Holistic Advancement for Security and Growth Across the Regions) — the expanded version of SAGAR, articulated by PM Modi.
- ③ **IPOI** (Indo-Pacific Oceans Initiative) — launched at the **East Asia Summit Bangkok on November 4, 2019** by PM Modi. Seven pillars: maritime security; maritime ecology; maritime resources; capacity-building and resource-sharing; disaster risk reduction; science, technology and academic cooperation; and trade connectivity and maritime transport.

## INDIA'S DISTINCT QUAD POSITION

India's position in the Quad differs structurally from the other three members:

- **Not in a formal US treaty alliance** — unlike Japan (1960 Mutual Cooperation Treaty), Australia (1951 ANZUS), or NATO.
- **Multi-alignment doctrine** — India simultaneously engages Quad, SCO, BRICS, IBSA, G20, I2U2.
- **Russia legacy** — approximately 60–70% of India's defence inventory is of Russian origin; S-400, Su-30MKI, T-90 tanks.
- **Strategic autonomy** as the default framing — India avoids characterising the Quad as anti-China militarily, instead emphasising public-goods provision.

## US-INDIA BILATERAL CONTEXT (TRUMP 2.0)

This was the first Quad event under the **full Trump 2.0 administration**, against a layered backdrop:

- **Trump tariff regime** — 25% reciprocal tariff + 25% additional penalty on imports from countries continuing Russian oil purchases, effective August 27, 2025.
- **TRUST initiative** — Transforming Relationships Utilizing Strategic Technology — announced in the **February 13, 2025 Modi-Trump Washington joint statement**.
- **Mission 500** — bilateral trade target of USD 500 billion by 2030.
- Continued cooperation on iCET (Initiative on Critical and Emerging Technology) legacy frameworks.

## STRATEGIC SIGNIFICANCE

For India, the 11th Quad FM Meeting accomplished four objectives:

- ① **Named Pahalgam in a Quad document** — a major diplomatic gain on counter-terrorism narrative.
- ② **Secured a USD 20 billion critical minerals architecture** that aligns with NCMM and KABIL.
- ③ **Operationalised IPMSC** — embedding India's P-8I fleet in a multilateral surveillance regime.

- ④ **Hosted Rubio's first India visit** — locking the Trump administration into Quad continuity despite tariff frictions.

## UPSC RELEVANCE

### GS Paper 2 — International Relations:

- India and its neighbourhood; bilateral, regional and global groupings.
- Effect of policies and politics of developed and developing countries on India's interests.
- Important International institutions, agencies and fora — their structure and mandate.

### Key analytical themes:

- Minilateralism vs multilateralism: how the Quad fills the governance gap left by gridlocked UN bodies.
- Strategic autonomy in a polarised order: India's multi-alignment.
- Critical minerals as the new oil — geo-economics of the energy transition.
- Net security provider role in the Indian Ocean Region.

**FACTS CORNER**

11th Quad FM Meeting: New Delhi, May 26, 2026, at Hyderabad House.

Quad members: India, United States, Japan, Australia.

Outcome documents adopted: 4 (Joint Statement; Fact Sheet; Joint Statement on Indo-Pacific Energy Security; Quad Critical Minerals Initiative Framework).

Quad Critical Minerals Initiative Framework: mobilises up to USD 20 billion in government + private support.

IPMSC: Indo-Pacific Maritime Surveillance Collaboration — first-ever Quad asset-pooling initiative; initial focus Indian Ocean Region.

IPMDA launched: Tokyo Quad Summit, May 24, 2022.

Quad Fuel Security Forum host: United States, later in 2026.

Ports of the Future — first partner: Fiji.

Indo-Pacific Logistics Network (IPLN) TTX-2 host: Japan, 2026.

Terror attacks named in Joint Statement: Pahalgam (April 22, 2025) and Bondi Beach (December 14, 2025).

Marco Rubio: US Secretary of State since January 20, 2025; 72nd Secretary of State.

Penny Wong: Australia's Foreign Minister since 2022.

Toshimitsu Motegi: Japan's Foreign Minister.

Quad 2.0 revived: November 2017, Manila.

First Quad Leaders' Summit (virtual): March 12, 2021.

First in-person Quad Summit: September 24, 2021, Washington DC.

IPOI launched: East Asia Summit, Bangkok, November 4, 2019 by PM Modi.

SAGAR doctrine: articulated 2015; MAHASAGAR is the expanded successor.

China's share in global rare earth processing: 85–90%.

National Critical Mineral Mission (NCMM): ₹16,300 crore, launched January 2025.

KABIL: NALCO + HCL + MECL JV for overseas critical mineral exploration.

India's Critical Mineral List: 30 minerals, notified by Ministry of Mines in 2023.

India's P-8I fleet: 12 long-range maritime patrol aircraft.

Sources: [MEA](#), [US State Department](#), [PIB](#)

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PM Modi Bilaterals with Wong and Motegi on Quad Margins

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